# Cisco Unified Communications Manager Assistant User Guide for Cisco Unified Communications Manager 7.1(3)

**Americas Headquarters**
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
http://www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883

Text Part Number: OL-19985-01

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# Preface

This user guide describes how to use the Cisco Unified Communications Manager Assistant (Manager Assistant). It is written for the managers and assistants who are using it.

The guide is organized into these topics:

- "Introduction"—Manager Assistant description, the shared-line and proxy-line modes, and how to identify which mode you are using.
- "Getting Started with the Assistant Console"—Overview of the Assistant Console.
- "Using the Assistant Console to Handle Calls"—Using the Assistant Console to handle and monitor calls and features for one to five managers.
- "For Assistants—Using the Manager Assistant on Your Phone"—Using Manager Assistant on the assistant's Cisco Unified IP Phone.
- "For Managers—Using Your Phone with the Manager Assistant"—Using Manager Assistant on the manager's Cisco Unified IP Phone.
- "Configuring Manager Features"—How assistants and managers can customize manager features in the Manager Configuration window.

This preface covers these topics:


- Using Online Help, page vii
- Related Documentation, page viii
- Obtaining Documentation and Submitting a Service Request, page viii


## Using Online Help

The Manager Assistant interface provides task-oriented and context-sensitive help from most windows within the Manager Assistant user interface. To access help, click the **?** button or click **Help** in the menu bar, which is located along the top of the console.

After you open the help window, you can click **Search** to search the entire guide by keyword. (The Search feature may not function in some versions of online help.)

Click **View PDF** for a PDF of the entire guide.

# Related Documentation

For more information, see the Cisco Unified IP Phone documentation at this URL:

http://www.cisco.com/en/US/products/hw/phones/ps379/tsd_products_support_series_home.html

# Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at this URL:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html

Subscribe to the *What's New in Cisco Product Documentation* as a Really Simple Syndication (RSS) feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service, and Cisco currently supports RSS version 2.0.

# Introduction

The Cisco Unified Communications Manager Assistant application (called Manager Assistant) provides call-routing and other call-management features to help managers and assistants handle phone calls more effectively.

Assistants and managers can experience large phone-call volumes from inside and outside the Cisco Unified Communications Manager (CM) IP Phone network. A maximum of 3,500 assistants and 3,500 managers (7,000 total users) can be configured within a Cisco Unified CM network.

This topic contains these subtopics:


- Manager Assistant Overview, page 1
- Overview of Shared-Line and Proxy-Line Modes, page 2
- Identifying the Mode on a Manager's Phone, page 3
- Identifying the Mode on the Assistant Console, page 4
- Support for Other Languages, page 4


## Manager Assistant Overview

Within the framework of the Manager Assistant, it is helpful to understand the three key components—managers, assistants, and the Assistant Console. This topic describes these roles:

- Manager—A user whose incoming calls are intercepted and redirected to an assistant. At least one assistant supports a manager. A manager can use Manager Assistant directly on his or her Cisco Unified IP Phone by configuring features in the Manager Configuration window or ask assistants to configure the preferences.
- Assistants—A user who handles calls for a manager, such as the manager's assistant. An assistant can support as many as 33 managers. Incoming calls to a manager can be intercepted and redirected to an assistant automatically or manually. They can then answer, transfer, divert, and manage the calls.
- Assistant Console—Assistants can use this application on their computers to perform most Manager Assistant features:
  - Place, answer, transfer, put on hold, end, divert, or add conference participants to a call
  - Monitor a manager's call activity and feature status
  - Enable or disable manager features
  - Configure manager features

# Overview of Shared-Line and Proxy-Line Modes

The Manager Assistant operates in two modes—shared-line and proxy-line. The features available to you are based on the mode that your system administrator chose for your Manager Assistant configuration. See these topics:

- Using Manager Assistant in the Shared-Line Mode, page 2
- Using Manager Assistant in the Proxy-Line Mode, page 2

Note that before you begin using the Manager Assistant, you need to identify which mode your system administrator chose. To do this, check the Manager Settings application screen:

- Shared-line mode—Only the Do Not Disturb option appears on the screen.
- Proxy-line mode—Multiple options appear on the screen.

## Using Manager Assistant in the Shared-Line Mode

If your system administrator configured the Manager Assistant in the shared-line mode, the manager and assistant share a directory number, such as 8001, and are sharing a line. When a call comes in on 8001, it rings on both phones, and the assistant handles these calls for the manager.

In this mode, assistants and managers have these capabilities:

- If you are an assistant, you do not need to be logged in to receive calls. Calls to your manager ring on your phone automatically.
- If you are a manager, you can share your directory number with up to 10 assistants, and any of these assistants can answer and handle a call.

These Manager Assistant features do not apply in the shared-line mode. The assistant cannot see or access these call features on the Assistant Console application:

- Assistant Selection
- Assistant Watch—The manager's phone does not have this softkey.
- Call Filtering—The manager's phone does not have this softkey.
- Divert All—The assistant's and manager's phones do not have this softkey.

## Using Manager Assistant in the Proxy-Line Mode

If your system administrator configured Manager Assistant in the proxy-line mode, the manager and assistant do not share a directory number. The assistant handles calls for a manager using a proxy number (line), which is not the manager's directory number. It is an alternate number that the system chooses and represents the manager's actual directory number.

In the proxy-line mode, a manager and an assistant have access to all call features in Manager Assistant, including Assistant Selection, Assistant Watch, Call Filtering, and Divert All.

In the proxy-line mode, assistants and managers have these capabilities:

- If you are an assistant, you must log in to the Assistant Console and be online to receive calls on your phone that were incoming to your manager. You can use the Assistant Console for all call-handling features, such as answering or transferring calls.
- If you are a manager, you can set up filters to sort and filter incoming calls to your assistant.

# Identifying the Mode on a Manager's Phone

To identify the mode on a manager's phone, reset the LCD display on the phone by picking up the receiver and replacing it.

If you see a single bell (or crossed-out bell) icon in the status window of the LCD display, you are using Manager Assistant in the shared-line mode. See Figure 1. (The icon is black and white on some Cisco Unified IP Phone models.)

***Figure 1 Shared-LIne-Mode Display on Cisco Unified IP Phones***

If you see multiple icons in the status window of the LCD display, you are using Manager Assistant in the proxy-line mode. See Figure 2. (The icons are black and white on some Cisco Unified IP Phone models.)

***Figure 2 Proxy-Line-Mode Display on Cisco Unified IP Phones***

# Identifying the Mode on the Assistant Console

On the Assistant Console, use this procedure to identify the Manager Assistant mode.

### Procedure

**Step 1** Log in to the Assistant Console. See Logging In and Out of the Assistant Console, page 6.

**Step 2** Find the extension number adjacent to a manager's name in the My Calls Panel. See Using the My Calls Panel, page 10.

**Step 3** For the same manager, find the extension number adjacent to the telephone icon in the Call Details column in the My Manager's Panel. See Using the My Managers Panel, page 11.

If you cannot see a number adjacent to the telephone icon, increase the column width by clicking and dragging the Call Details heading border.

**Step 4** Verify if the manager's and assistant's extension numbers are the same or different:

- Extensions the same—Shared-line mode. You can see four headings in the My Manager's Panel—Manager, Intercom, DND, and Call Details.
- Extensions that are different—Proxy-line mode. You can see the headings that you see in the shared-line mode and four additional headings—Divert All, Asst. Watch, Filter Calls, and Filter Mode.

# Support for Other Languages

The Manager Assistant supports a number of different languages, including Arabic and Hebrew.

(If Arabic or Hebrew are used, the Manager Assistant application screens change to reflect the right-to-left direction of these languages.)

For more information on using different languages with your phone, contact your system administrator.

# Getting Started with the Assistant Console

As assistants, you can access the Manager Assistant features on your computer using the Assistant Console application to handle calls for managers. The Manager Assistant enables you to handle calls for yourself and for as many as 33 managers. See Introduction, page 1.

Within this topic, see these subtopics:


- Logging In and Out of the Assistant Console, page 6
- Exploring the Console without Assisting Managers, page 7
- Using the Console with Your Mouse and Keyboard, page 15
- Using the Intercom Feature from the Console, page 16
- Using Keyboard Shortcuts, page 17
- How You and Your Manager Use the Manager Assistant, page 17


On the Assistant Console, you can perform these call functions:

- Place, answer, divert, transfer, end, or hold a call.
- Add conference participants to a call.
- Perform speed dialing.
- Do directory searches.
- Open an intercom line to your manager. (If the intercom feature is not available on your phone, contact your system administrator.)
- Monitor manager call activity and change manager features and settings.
- Customize your call-handling tools.
- Enter numbers on a virtual keypad in response to interactive voice systems.

# Logging In and Out of the Assistant Console

Use these steps to log in and out of the Assistant Console. When you log in, you are online and ready to handle calls. In the My Managers panel, two green arrows next to a manager's name indicate that the manager is logged in and therefore anticipating assistance. A manager whose name is grayed-out is not expecting assistance.

If you click the **Settings** button in the Log In dialog box, you can monitor administrative settings, which your system administrator may ask you to do in case of a problem. Do not modify these settings unless your system administrator instructs you to do so.

**Note** As of Release 6.1(4), if the system administrator changes a user's username, preferred location, or password (assistants), that user is not logged off. For user-ID changes, neither the manager nor his or her assistant is logged off when that manager's user ID is changed; however, an assistant is logged off the assistant's phone and the Assistant Console when that assistant's user ID is changed.

### Procedure

**Step 1** Obtain your username and password from your system administrator.

**Step 2** To log in to the Assistant Console, enter your username and password in the Manager Assistant Log In dialog box. (You can specify for your login information to be remembered.) The Assistant Console opens on your desktop. You are logged in until you log off or until your online, connected, or call-control status changes for some reason. See Using the Status Bar, page 14.

**Step 3** To log out, click **File > Exit** from the menu bar at the top. If you check the **Remember user ID and Password** option, you will be logged in automatically the next time that the Assistant Console is started on your computer.

If you are using a shared computer, you may want to log out of the Assistant Console by clicking **File > Log Out** from the menu bar. When you log in the next time, the Assistant Console will display the Log In dialog box instead of logging you in automatically with your username and password.

# Exploring the Console without Assisting Managers

If you are using the Manager Assistant in the proxy-line mode, you can get familiar with the Assistant Console without making yourself available to managers. In that case, the Manager Assistant moves managers to another assistant.

During this time, you cannot receive phone calls for managers, and the My Managers panel on your console is inactive.

You cannot go offline to explore in the shared-line mode.

This topic contains these subtopics:


- Going Offline and Back Online, page 7
- Using the Menu Bar, page 8
- Using Call-Control Buttons, page 8
- Using the My Calls Panel, page 10
- Using the My Managers Panel, page 11
- Using the Speed Dial Feature, page 13
- Using the Directory, page 14
- Using the Status Bar, page 14
- Adjusting the Console Layout, page 14
- Viewing Administrative Settings, page 15


## Going Offline and Back Online

Use these steps to go offline and back online.

When you go offline and back online, you are available again, and the Manager Assistant may move managers back to you if you had been the default and if other assistants are unavailable.

Your online status is visible from the status bar in the lower right corner of the console.

### Procedure

**Step 1** To go offline, log in as usual and click the **Go Offline** call-control button, which is the first icon button in the row of icons along the top or side of your screen. (You can also choose **File > Go Offline** from the menu bar.)

**Step 2** To go back online, click the **Go Online** call-control button, which is the same one as Go Offline. Again, you can choose **File > Go Online** from the menu bar.

# Using the Menu Bar

You can use the menu bar, which is located at the top of the Assistant Console, as follows (context-sensitive menu commands):

- File—Go online and offline, log in and out, and exit the console.
- Edit—Create and edit speed dials, personalize keyboard shortcuts, change the divert target, set preferences, and access administrator settings.
- View—Specify text size and color schemes and refresh the default layout.
- Call—Dial, answer, hang up, place on hold, transfer, divert, or add conference participants to a call.
- Manager—Place an intercom call to a manager, access the Manager Configuration window, and enable or disable features for a manager. (If the intercom feature is not available on your phone, contact your system administrator.)
- Help—Access online help.

# Using Call-Control Buttons

You can perform tasks from the Assistant Console by clicking call-control buttons (the row of icons located along the top or side of the console). Position your mouse over a call-control button to see a description of its function.

Call-control buttons are context-sensitive. A button's availability depends on the state of the selected call. Before you click the button, make sure that the call is selected (highlighted).

You can right-click on the blank space (not on the buttons themselves) in the call-control panel to rearrange its position on the console.

See Table 1 for a list of call-control buttons.

***Table 1 Call-Control Buttons***

| Call-control button | What it does |
|---|---|
| Go Online | The Go Online and Go Offline buttons enable you to toggle your connection status on the Assistant Console.<br>The Go Online button enables you to resume your online connection on Assistant Console to handle calls for your manager. |
| Go Offline | The Go Online and Go Offline buttons enable you to toggle your connection status on the Assistant Console.<br>The Go Offline button enables you to go offline and explore the console. You are unavailable to handle manager calls during this time. |

*Table 1 Call-Control Buttons (continued)*

| Call-control button | What it does |
|---|---|
| Dial | Opens a dialing pad that you can use to place outgoing calls. |
| Answer | Connects you to an incoming call. |
| Hang Up | Ends an active call. |
| Hold | The Hold and Resume buttons enable you to toggle a call's hold status.<br>The Hold button places a call on hold. |
| Resume | The Hold and Resume buttons enable you to toggle a call's hold status.<br>The Resume button takes a call off hold. |
| Transfer | Transfers a connected call directly to the target number that you enter in a pop-up window. |
| Consult Transfer | Works like the Transfer button but enables you to speak to the person to whom you want to transfer a call. |
| Direct Transfer | Transfers one existing call to another existing call. |
| Conference | Enables you to add conference participants to a call. |

*Table 1 Call-Control Buttons (continued)*

| Call-control button | What it does |
|---|---|
| Join | Conferences multiple existing calls. You can join up to 15 simultaneous calls. |
| Redirect | Immediately diverts a ringing, connected, or held call to the manager for whom the call was originally intended, or to another target number. To specify your divert target, choose **Edit > Redirect** from the menu bar. |
| Transfer to VM | Redirects a ringing or connected call to the manager's voice messaging system. |

## Using the My Calls Panel

The Assistant Console displays calls for you and for your managers in the My Calls panel. These are calls that you can act on by using the Assistant Console tools.

Each call is displayed beneath its associated phone line.

Each phone line is displayed beneath one of these headings:

- My lines—Displays any currently active call that you have placed or received using your own phone line.
- Manager lines—Displays active calls that you are handling or can handle for your manager.
- Intercom—Displays the status of your intercom lines, if applicable.

Depending on the number of managers assigned to you, you will see 1 to 33 lines in the "Manager lines" section of the My Calls panel.

Each manager line contains the following:

- Either your manager's shared-line number or your manager's proxy extension number.
- The manager's name.
- Active call information—Active calls are represented with the following:
  - An animated icon indicating the status of the call (ringing, connected, or on hold)
  - The caller ID
  - A timer indicating the duration of the call

When transferring a call to a manager, you must enter the actual extension, rather than a proxy extension. You can see a manager's actual phone extension in the My Managers panel on the Assistant Console.

You cannot apply “Transfer to Voice Messaging” or “Redirect” to calls that you place or receive on your own phone line. These features apply only to calls you receive on a manager’s line.

When you are using Manager Assistant in the shared-line mode, you can identify that your manager or another assistant has answered a call when you see a double red arrow next to your manager’s line.

## Using the My Managers Panel

You can use the My Managers panel in the Assistant Console to monitor call activity and feature status for each of your managers. You can also enable and disable a manager features from this panel.

You can monitor, but cannot handle, calls that appear here. These calls have already been redirected to your manager, or they are calls that your manager has placed or received directly.

**Note** Alert Tone, Do Not Disturb, Divert All, Assistant Watch, Filter Calls, and Filter Mode features are available only in the proxy-line mode.

Table 2 describes the information displayed under each column heading in the My Managers panel.

***Table 2 My Managers Panel Display***

| Column Heading | What it means |
|---|---|
| Manager | Manager name. If the entire row of information for a manager is grayed out, the manager is not expecting you to handle his or her calls. In addition, you may see these two different icons next to the manager icon:<br>• If you see two green arrows next to the manager icon, that manager is expecting you to handle his or her calls.<br>• If you see an envelope icon next to the manager icon, that manager has a voice message. |
| Intercom | Click this column to place an intercom call to a manager.<br>**Note** If the intercom feature is not available on your phone, contact your system administrator. |
| DND | If this box is checked, the Do Not Disturb (DND) feature is enabled. To toggle DND on and off, click the DND cell. The DND feature disables the ringer on the manager’s phone; it does not redirect calls.<br>**Note** If the DND feature is not available on your phone, contact your system administrator. |
| DivAll | (Proxy-line Mode Only) If this box is checked, the Divert All (DivAll) feature is enabled. To toggle Divert All on and off, click the DivAll cell. Divert All automatically redirects all incoming calls to the manager’s divert target. |

*Table 2 My Managers Panel Display (continued)*

| Column Heading | What it means |
|---|---|
| Assistant Watch | (Proxy-Line Mode Only) A check mark indicates that the manager has enabled Assistant Watch to view the caller ID and duration of calls that you are handling for him or her. |
| Alert Tone | (Proxy-Line Mode Only) A check mark indicates that calls to the manager generate an audio alert on the manager's phone. |
| Filter Enabled | (Proxy-Line Mode Only) If this box is checked, a call filter is active. To toggle the filter on and off, click the filter cell. Filters can route calls to you or to the corresponding manager, based on caller ID and filter mode. |
| Filter Mode | (Proxy-Line Mode Only) There are two filter modes:<br>• Inclusive—Calls that match the numbers in the Inclusive filter are sent to the manager. The rest are redirected to you.<br>• Exclusive—Calls that match the numbers in the Exclusive filter are redirected to you. The rest are sent to the manager.<br>To configure filters for a manager, use the Manager Configuration window. Right-click anywhere in a manager's row in the My Managers panel and choose **Configure** to open this window.<br>**Note** In the initial default filter settings, the Inclusive filter is enabled and all manager calls are directed to you. |
| Call Details | Call details consist of the manager's line number, the call duration, and the caller ID:<br>• Line—The actual extension number for the manager's primary phone line; a phone icon indicates the line state.<br>• Call duration—The real-time duration of an active call that the manager placed or received. The timer starts as soon as a call is initiated (outgoing) or received (incoming). The timer stops when the call is dropped or transferred.<br>• Caller ID—The name (if available) and number of the person to whom the manager placed a call or from whom the manager received a call. The Assistant console displays forwarded call information when the information is available. |

# Using the Speed Dial Feature

The speed dial feature enables you to set up a personal phone book on the Assistant Console. You can place calls and perform other call-handling tasks using speed dial numbers.

To open the speed dial menu and view a list of available commands, right-click on the Speed Dials panel or choose **Edit > Speed Dials** from the menu bar. If some speed dial commands are grayed-out, try selecting a speed dial listing before opening the menu.

Use the speed dial menu to create and modify speed dial groups, place a call, specify a transfer target, and add conference participants to a call.

To access speed dial numbers quickly, consider organizing entries into speed dial groups. For example, you can create a personal group for yourself and a group for each of your managers.

When you add new speed dial listings, the listings appear in the order that you created them. To sort all the items in a speed dial list, click on a column header (Name, Telephone Number, or Notes). Lists are sorted alphabetically or numerically, depending on the header you choose. Click the header again to toggle between ascending and descending order.

You can make calls using your speed dial listings in one of these ways:

- Drag the speed dial entry to either your line or your manager's line.
- Make a call on your line or your manager's line by highlighting the line and double-clicking on the speed dial entry.
- Drag the speed dial entry to the dial button on your call-control panel and click **OK**.

Here are some quick ways to use your speed dial listings (without opening the speed dial menu):

- To perform a blind transfer to a person in your speed dial list, drag and drop an active call to the person's speed dial listing.
- To add a new speed dial listing, drag and drop a listing from the Directory panel to the Speed Dial panel.

**Note** The Sample speed dial group and example speed dial listing are inactive. They are included to demonstrate how speed dial information appears on the console. You can delete the samples at your convenience.

## Using the Directory

Use the directory to search for a coworker and to place and handle calls using the search results.

To search for a coworker, enter any part of the person's first and/or last name in the search fields and click **Search**. Search results are sorted by first name, last name, phone number, and department. To clear search results and search fields, click **Clear**.

Here are some ways to use the search results:

- Double-click on a person's name or number to place a call.
- Right-click a person's name to display a pop-up menu containing relevant commands.
- To perform a blind transfer to a person in your directory, drag and drop an active call to the appropriate name or number.
- To add a new speed dial listing, drag and drop a listing from the Directory panel to the Speed Dials panel.

## Using the Status Bar

The status bar is located at the bottom of your Assistant Console screen and displays this system information:

- Connected/Not Connected—Indicates the status of your connection to the Manager Assistant server.
- Online/Offline—Indicates your availability to managers.
- Call-Control Up/Call-Control Down—Indicates the availability of call-handling features.
- Filtering Down—Indicates the availability of the call-filtering features.

The status bar also displays a pop-to-top icon to indicate if your console is set to appear automatically on your desktop when you receive an incoming call. Click this icon to toggle the feature on and off. (It is disabled by default.) When the feature is enabled, the icon appears darker (depressed).

You can also enable and disable pop-to-top option from the **Edit > Preferences** menu.

## Adjusting the Console Layout

You can customize the size and position of panels in the Assistant Console. Use the View menu to change the color scheme and font and to refresh initial default settings.

You can set the console to appear automatically on your desktop when you receive an incoming call. To enable this pop-to-top feature, choose **Edit > Preferences** from the main menu and then click the "Activate console on new call" check box. A pop-to-top icon is located in the status bar at the bottom of your console screen. The icon appears darker (depressed) when the feature is enabled.

## Viewing Administrative Settings

You can view your administrative settings from the Log In dialog box or you can choose **Edit > Settings** from the menu bar. You do not need to modify settings unless your system administrator instructs you to do so.

These are the two types of settings:

- Basic Settings
  - Manager Assistant Server Host Name or IP address
  - Manager Assistant Server Port
- Advanced Settings
  - Displays the location where your trace files are stored
  - Traces enabled or disabled

## Setting Preferences

You can enable these two settings in the Preferences menu:

- Setting the console to appear automatically on your desktop when you receive an incoming call. See Adjusting the Console Layout, page 14.
- Setting your computer to launch the Assistant Console automatically when you start up your computer—To enable the automatic startup feature, choose **Edit > Preferences** from the main menu and then click the "Autostart Console on computer startup" check box. The Assistant Console will launch automatically the next time that you start up your computer

To disable each of the features, uncheck the corresponding check box.

# Using the Console with Your Mouse and Keyboard

The Assistant Console provides you with several mouse and keyboard combinations to perform tasks:

- Click, right-click, and double-click console items.
- Drag and drop console items. For example, you can drag and drop a selected call from the My Calls panel onto the Speed Dials panel to add a speed dial listing.
- Use keyboard shortcuts.

For example, you can from these options to answer a call:

- Click the **Answer** call-control button.
- Double-click the call in the My Calls panel.

- Right-click the call in the My Calls panel and then choose **Answer** from the pop-up menu.
- Use a keyboard shortcut.

**Tip** You can find all of the options for performing a specific task, such as transferring a call, in "Using the Assistant Console to Handle Calls."

# Using the Intercom Feature from the Console

The Intercom feature is an optional feature that enables you to speak to a manager on an intercom line.

It is configured by your system administrator so if the feature is not available on your phone, contact your system administrator.

### Procedure

**Step 1** To place an intercom call, do one of the following:

- Double-click that manager's name in the My Calls panel.
- Single-click the Intercom icon in the My Managers panel.
- Initiate the intercom call without specifying a manager. (This feature available for all Cisco Unified IP phones except for the Cisco Unified IP Phones 7961G-GE, 7961G, 7960G, 7941G-GE, 7941G, and 7940G.)

**Step 2** When you initiate this call, the manager's speakerphone answers automatically. You can begin talking using the speakerphone, headset, or handset. To speak to you, the manager must press the Intercom button on his or her IP phone.

The manager at the top of your managers list becomes the target for your call. (And the manager you connect to through an intercom call becomes the target of your button.)

**Note** Only for the Cisco Unified IP Phones 7961G-GE, 7961G, 7960G, 7941G-GE, 7941G, and 7940G, if your manager is on another call when you initiate an intercom call, the call rings on the manager's phone and he or she must answer the call manually to hear the intercom. (This is also the case when a manager places an intercom call to you at a time when you are on another call.) For other phones, the manager does not need to answer the call to hear the intercom, , as described at the beginning of this step.

**Step 3** To end the intercom call, click the Intercom icon again.

# Using Keyboard Shortcuts

You can use keyboard shortcuts, rather than your mouse, to use most of the tools and features on the Assistant Console. Keyboard shortcuts can help you handle calls more efficiently.

You can use initial default shortcuts or you can customize shortcuts to suit your needs. The Manager Assistant remembers a customized shortcut the next time you log in.

## Viewing Shortcuts

Click an item in the menu bar to display commands and shortcuts. A keyboard shortcut is associated with most menu commands.

You can also view shortcuts from the Edit Shortcut Key pop-up window. Choose **Edit > Keyboard Shortcuts** to open the window and then select a menu command from the list to see the associated shortcut.

For example, if you select Call > Answer in the Edit Shortcut Key window, you can see that the initial default shortcut uses a combination of the Control key (Ctrl) and the A key (Ctrl-A).

## Customizing Keyboard Shortcuts

To customize a keyboard shortcut, choose **Edit > Keyboard Shortcuts** from the menu bar. Select a menu command from the list and click Ctrl, Shift, or Alt to assign the first part of the shortcut. Next, enter a letter or number in the Key field to assign the last part of the shortcut. Click **Save** to assign the new keyboard shortcut to the selected command.

## Using Shortcuts

To use a shortcut, hold down the first key in the shortcut combination and press the second key. For example, if you want to use the Ctrl-L shortcut to put a call on hold, hold down **Ctrl** and press **L**.

For keyboard shortcuts to work, the Assistant Console page must be the active window on your desktop.

# How You and Your Manager Use the Manager Assistant

You will use the Manager Assistant features from your phone and the Assistant Console to handle calls for your manager. For example, when you answer a a call for your manager, you may want to consult your manager by double-clicking the intercom line on your Assistant Console. If your manager chooses to pick up the call, you can forward the call by selecting the Redirect call button on the Assistant Console or by choosing the **Redirect** softkey on your phone. If your manager wants the caller to leave a voice message, you can forward the call to your manager's voice-messaging system by selecting the Transfer to Voice Mail call button or by choosing the **TrnsfVM** softkey.

Your manager uses the Manager Assistant features primarily from the Cisco Unified IP Phone, as in these examples:

- Your manager may be expecting a call from a real-estate broker. Your manager would enable Assistant Watch to monitor the incoming calls. When the realtor's number appears, your manager can intercept the call with the **Intrcpt** softkey.
- Your manager can also press the **Redirect** softkey on the phone to divert a ringing call to you. He or she can confirm that you have answered the diverted call and monitor the duration of the call by looking at the Manager Assistant status window on the phone's LCD screen.

You or your manager can customize manager features from the Manager Configuration window. To open this window, choose **Manager > Configuration** from the menu bar, or right-click anywhere in a manager's row in the My Managers panel and choose **Configuration**.

# Using the Assistant Console to Handle Calls

You can use your mouse and keyboard to place, answer, transfer, end, and generally handle calls from the Assistant Console.

Ensure the call you want to handle is selected (highlighted) on the console. Call-control buttons and menu items appear grayed-out (inactive) if they are not relevant to the selected call.

Within this topic, see these call-handling subtopics:


- Placing Calls, page 19
- Answering Calls, page 20
- Ending Calls, page 20
- Putting Calls on Hold, page 20
- Transferring Calls, page 21
- Setting Up a Conference Call, page 22
- Diverting a Call to Another Number, page 23
- Sending a Call to a Voice-Messaging Service, page 24


For more information, see these topics:


- Using Keyboard Shortcuts, page 17
- Using the Assistant Console to Handle Calls, page 19


## Placing Calls

To place a call from the Assistant Console, choose any of these options:

- Click the **Dial** call-control button.
- Right-click a phone line in the My Calls panel and choose **Dial** from the pop-up menu.
- From the menu bar, choose **Call > Dial**.
- Double-click a speed dial or directory number.
- Drag and drop a directory number into the My Calls panel.
- Use the associated keyboard shortcut.
- With the console open and active on your desktop, enter the phone number that you want to call using your keyboard and then press **Enter**. You can see the number that you are calling in the status bar along the bottom of the console.

If the Enter Number pop-up window appears, enter the phone number that you want to call and click **OK**. Enter the number exactly as you would if you were placing the call from your Cisco Unified IP Phone.

Calls originated from Assistant Console use the first physical line of the Assistant phone.

## Answering Calls

To answer a selected call, choose any of these options:

- Click the **Answer** call-control button.
- In the My Calls panel, double-click a ringing call.
- Right-click the call and choose **Answer** from the pop-up menu.
- From the menu bar, choose **Call > Answer**.
- Use the associated keyboard shortcut.

If the incoming call that you want to answer is not selected, click the incoming call to select it before performing one of the above actions.

## Ending Calls

To end a selected call, choose one of these options:

- Click the **Hang Up** call-control button.
- Right-click the call and choose **Hang Up** from the pop-up menu.
- From the menu bar, choose **Call > Hang Up**.
- Use the associated keyboard shortcut.

## Putting Calls on Hold

To put a selected call on hold, choose one of these options:

- Click the **Hold** call-control button.
- Double-click the connected call.
- Right-click the call and choose **Hold** from the pop-up menu
- From the menu bar, choose **Call > Hold**.
- Use the associated keyboard shortcut.

# Removing Calls from Hold

To take a selected call off of hold, choose one of the following options:

- Click the **Resume** call control button.
- Double-click the held call.
- Right-click the call and choose **Resume** from the pop-up menu
- From the menu bar, choose **Call > Resume**.
- Use the associated keyboard shortcut.

# Transferring Calls

To transfer a call, you must answer it first. After you transfer a call, you cannot retrieve it unless the call is transferred back to you.

Transfer calls in one of these ways:

- Transfer—Redirects the call immediately without allowing you to speak to the transfer recipient (the person to whom you are transferring the call)
- Consult transfer—Redirects the call after first allowing you to speak to the transfer recipient
- Direct transfer—Connects two calls (active calls and calls on hold) directly

## Transfer

To begin transferring a selected call, choose one of these options:

- Click the **Transfer** call-control button.
- Right-click the call and choose **Transfer** from the pop-up menu.
- From the menu bar, choose **Call > Transfer**.
- Drag the call to a listing in the Speed Dials or Directory panel.
- Use the associated keyboard shortcut.

The Enter Number pop-up window appears (unless you drag the call to a listing in the Speed Dials or Directory panel). Enter the transfer recipient's phone number and click **OK**.

## Consult Transfer

To perform a consult transfer for a selected call, choose one of these options:

- Click the **Consult Transfer** call-control button.
- Right-click the call and choose **Consult Transfer** from the pop-up menu.
- From the menu bar, choose **Call > Consult Transfer**.

- In the Speed Dials or Directory panel, right-click the listing to which you want to transfer the call and then choose **Consult Transfer** from the pop-up menu.
- Use the associated keyboard shortcut.

If the Enter Number pop-up window appears, enter the transfer recipient's phone number and click **OK**.

After you have spoken to the recipient, click the **Consult Transfer** button again to complete the transfer.

You cannot complete a consult transfer while the phone is ringing or by using the drag-and-drop method. You must speak to the recipient to complete a consult transfer.

### Direct Transfer

To perform a Direct transfer for a pair of calls, highlight the two calls and choose one of these options:

- Click the **Direct Transfer** call-control button.
- Right-click the call and choose **Direct Transfer** from the pop-up menu.
- From the menu bar, choose **Call > Direct Transfer**.

## Setting Up a Conference Call

You can set up a conference call in one of these ways:

- Conference—Initiate a call to add participants in a conference.
- Join—Connect active calls and calls on hold in a single conference call.

To add conference participants to an active and selected call, choose one of these options:

- Click the **Conference** call-control button.
- Right-click the call and choose **Conference** from the pop-up menu.
- From the menu bar, choose **Call > Conference**.
- Right-click a listing in the Speed Dials or Directory panels and choose **Conference** from the pop-up menu.
- Use the associated keyboard shortcut.

If the Enter Number pop-up window appears, enter the conference participant's phone number and click **OK**.

After you have spoken with the new conference participant, click the **Conference** button again to add the person to the call.

To set up a conference call using Join, highlight the calls that you want in the conference and choose one of these options:

- Click the **Join** call-control button.
- Right-click on the call and choose **Join** from the pop-up menu.
- From the menu bar, choose **Call > Join**.

# Diverting a Call to Another Number

Use Redirect to transfer a selected call to a predetermined target number. You can redirect a call that is ringing, connected, or on hold.

The initial or default targets differ based on the mode:

- In the proxy-line mode, the initial default target is the manager for whom the call was originally intended.
- In the shared-line mode, no default target exists. However you can configure the target using any valid phone number or extension.

## Using Redirect

Unlike Transfer, which requires you to specify the target with each use, Redirect sends calls to a single, predetermined target number. You can divert a call that is ringing, connected, or on hold.

You cannot divert a call that you have placed or received on one of your own phone lines (rather than on a manager's proxy line).

To redirect a selected call to the Divert target, choose one of these options:

- Click the **Redirect** call-control button.
- Right-click on the call and choose **Redirect** from the pop-up menu.
- From the menu bar, choose **Call > Redirect**.
- Use the associated keyboard shortcut.

## Configuring the Divert Target

You can set your Divert target to be the manager for whom the call was originally intended or another directory number.

To view or change the target, choose **Edit > Redirect** from the menu bar. The Divert Target pop-up window appears:

- In the shared-line mode, enter a phone number or office extension in the text box. Enter the number exactly as you would dial it from your office phone.
- In the proxy-line mode, you can choose to toggle between a Manager or Directory Number target. If you choose the Director Number option, enter a phone number or office extension. Enter the number exactly as you would dial it from your office phone.

Click **Save**.

You can also configure a Divert target for your manager, which is distinct from your target. For instructions, see Configuring the Divert Target for a Manager, page 50.

You can divert a call using your Cisco Unified IP Phone. Answer the call, then press the **Redirect** softkey on your Cisco Unified IP Phone to transfer the call to your Divert target.

# Sending a Call to a Voice-Messaging Service

You can transfer a ringing or connected call that you are handling for a manager to that manager's voice-messaging service. To send the selected call, choose one of these options:

- Click the **Transfer to Voice Mail** call-control button.
- Right-click on the call and choose **Transfer to Voicemail** from the pop-up menu.
- From the menu bar, choose **Call > Transfer to Voicemail**.
- Use the associated keyboard shortcut.

You can also perform this task from your Cisco Unified IP Phone. Answer the call and then press the **TrnsfVM** softkey on your Cisco Unified IP Phone to transfer the manager's call to his or her voice-messaging service.

This feature does not apply to calls that you have placed or received on one of your own phone lines. It applies only to calls on your manager's proxy line.

# For Assistants—Using the Manager Assistant on Your Phone

This topic describes how you can access Manager Assistant features directly on your Cisco Unified IP Phone (sometimes called the "Assistant Phone"). Within this topic, see these subtopics:


- Logging in to the Manager Assistant on Your Phone, page 26
- Checking the Status of Your Managers, page 27
- Handling Calls and Performing Other Actions, page 28
- Answering a Call Using Manager Assistant on the Phone, page 29
- Configuring Manager Settings, page 29
- Configuring Assistant Settings, page 32
- Customizing the Distinctive Ringing Feature, page 34


You can use the buttons and softkeys on your phone to perform most tasks that you can perform using the Assistant Console. You can also use your phone to perform some tasks while you use the Assistant Console at the same time to perform other tasks. Also, features available on your phone are also available on the Assistant Console, with the exception of Distinctive Ringing.

To use the Manager Assistant on your phone, we recommend strongly that assistants support no more than five managers.

Also, several tasks cannot be performed on the phone, such as assigning the preferred assistants. The manager assigns these using a website that your system administrator has set up, and you assign these using the Assistant Console.

The Manager Assistant feature on your phone is supported on these Cisco IP Phones:

- Cisco Unified IP Phones 7945G, 7942G, 7941G-GE, 7941G, and 7940G
- Cisco Unified IP Phones 7965G, 7962G, 7961G-GE, 7961G, and 7960G
- Cisco Unified IP Phone 7975G, 7971G-GE, and 7970G

Before you begin, you must identify which mode your system administrator chose: shared-line or proxy-line. For more information about the modes and for which mode you are using, see Overview of Shared-Line and Proxy-Line Modes, page 2.

# Logging in to the Manager Assistant on Your Phone

Use these steps to log in to the Manager Assistant on your phone.

### Procedure

**Step 1** Press the **Services** button on the phone.

**Step 2** Select **Primary IPMA Phone Service**.

**Step 3** Enter your user ID and PIN and then press **Submit**.

The Manager Status screen should appear (see Figure 3).

***Figure 3 Manager Status Screen***

If the Primary IPMA service goes down, your IP Phone screen will not get updated about this condition. However, you will receive a “Host not found Exception” message when you try to use a softkey. In this case, you must select **Secondary IPMA Phone Service** manually from the IP Services menu and log in again.

# Checking the Status of Your Managers

You can see a list of managers that an assistant supports on the Manager Status screen (Figure 3). This topic describes the screen and the softkeys on it.

For each manager that an assistant supports, this information is displayed:

- Manager's Assistant Status line—Indicates if the assistant is online or offline.
- Number of managers in the list—Enables you to determine the number of managers quickly.
- Name of manager—The names are sorted in this order:
  - New call indication
  - Change of manager status from on hook
  - On hook
- Call-status icon—Table 3 shows the status icons that can appear to the left of the manager's name
- Proxy line of the manager

***Table 3 Call Status Icons on the Manager Status Screen***

| Manager call-state icon | What it does |
|---|---|
| Busy | Appears if the manager's phone is busy (phone line is in use). |
| Hold | Appears if the manager places a call on hold. |
| Idle/on hook | Appears if the manager's phone is on hook. |
| Off hook | Appears if that manager's phone is off hook (the handset is lifted or another audio device is in use). |
| Ring | Appears next when the manager's phone is ringing. |

*Table 3 Call Status Icons on the Manager Status Screen (continued)*

| Manager call-state icon | What it does |
|---|---|
| Unknown | Appears when Manager Assistant cannot determine the state, such as in the case of a CTI failure or the fact that the manager has not logged in yet. |
| MWI | MWI (which means message waiting indicator) appears if the manager has a voice message waiting. |

# Handling Calls and Performing Other Actions

Table 4 describes the softkeys that appear on the Manager Status screen. The softkeys enable you to perform a different call-handling task.

*Table 4 Softkeys on the Assistant's Phone*

| Softkey | What it does |
|---|---|
| Select | Selects the highlighted manager from the list of managers and takes you to the Manager Settings screen (see Figure 4 page 30), where you can configure settings for the selected manager. |
| Answer | Answers an incoming call for the corresponding manager. |
| Exit | Exits the Manager Status screen and takes you to the Services menu page. |
| Redirect | Immediately diverts a ringing, connected or on-hold call to the corresponding manager (by default) or to another preset number.<br>To set the divert target to a directory number, press **AsstSett**, then press **Set Divert Target**, then enter the number. |
| More | Shows the remaining available softkeys for the Manager Status screen. |
| TrnsfVM | Sends a ringing, connected, or on-hold call to that manager's voice mailbox. |
| InterCom | Enables you to speak to a manager on an intercom line. |

*Table 4 Softkeys on the Assistant's Phone (continued)*

| Softkey | What it does |
|---|---|
| GoOffLine | Takes you offline. If there is another assistant configured for the manager and if that assistant is online, that assistant becomes the active assistant for the manager.<br>If no other assistants are available, calls for the manager are not filtered or diverted, and all ring at the manager's phone.<br>**Note** When the primary assistant goes offline or logs out, the manager's phone and call status are shown on the phone of the next available assistant, which becomes the primary assistant. |
| AsstSett | Takes you to the Assistant Settings screen, where you configure various settings. See Table 6 page 33 for the fields you can configure. |

# Answering a Call Using Manager Assistant on the Phone

You can answer a call to a manager, which displays on the Manager Status page, in any of these ways:

- Press the **Answer** softkey on the Manager Status Page.
- Select the Line button of the ringing call or the speaker button.
- Exit the Manager Assistant application screen and select the Answer button on the Call Processing screen, which is the screen you can see after you exit the Manager Assistant screen. The Call Processing screen shows the originating number of the call and contains the **Answer**, **Redirect** and **TrnsfVM** softkeys.

After you answer the call, the Call Processing screen overwrites the Manager Assistant screen. (The Call Processing screen may be visible already.) Then use the softkeys on the Call Processing screen as you would normally. The Manager Assistant does not control these features.

# Configuring Manager Settings

Figure 4 shows the Manager Settings screen, which appears when you select a manager from the list shown in the Manager Status screen (see Figure 3).

Table 5 describes how to set the fields in this screen.

**Note** If you press menu items too rapidly when you are in the process of changing the manager settings from the Assistant Console, that manager is logged out as a security measure and the Assistant Watch window disappears. For the manager to be logged back in, a Save operation must be executed on that particular Manager Configuration web page.

*Figure 4 Manager Settings Screen*

*Table 5 Manager Settings Fields*

| Softkey | What it does |
|---|---|
| Filter | Toggles between **On** and **Off**. Change the setting of this field by highlighting the field and pressing **Select**. If this field is set to On, then the filter rules configured in the Filter Mode field apply.<br>**Note** To configure filters for a manager, you must use the Assistant Console. For more information, see Creating Filter Lists for a Manager, page 51. |
| Filter Mode | Toggles between **Exclusive** and **Inclusive**. Change the setting of this field by highlighting the field and pressing **Select**.<br>• Exclusive—Calls matching the phone numbers in the filter list are sent to the assistant; the remaining calls are sent to the manager.<br>• Inclusive—Calls matching the phone numbers in the filter list are sent to the manager; the remaining calls are sent to the assistant.<br>Permitted wildcard characters are **X** for a single digit and * for a string of digits at the beginning or end of a number only. |
| Do Not Disturb | Turns off the ringer on the manager's phone. This can be performed on a per-manager basis. |
| Divert Calls | Toggles between **On** and **Off**. Change the setting of this field by highlighting the field and pressing **Select**. If this field is set to **On**, Cisco Unified Communications Manager Assistant User Guide sends a ringing, connected or held call to the manager or to another preset number (a number you specify by selecting the **Set Divert Target** field). |
| Set Divert Target | The number to which calls are diverted, if the **Divert Calls** field is **On**.<br>Default: Calls are diverted to the corresponding manager's phone unless another Directory Number is configured here. |
| Alert Tone | Toggles between **On** and **Off**. Change the setting of this field by highlighting the field and pressing **Select**. If this field is set to **On** in a proxy-line environment, calls to the manager generate an audio alert on the manager's phone. |

# Configuring Assistant Settings

Figure 5 shows the Assistant Settings screen, which displays when you press the **AsstSett** softkey on the Manager Status screen (see Figure 3). The Assistant Settings screen lets you configure such items as divert targets and sorting for the Manager Status screen.

Table 6 describes how to set the fields on the screen, and Table 7 describes how to use the softkeys on the screen.

***Figure 5 Assistant Settings***

*Table 6 Assistant Settings Fields*

| Field | What it does |
|---|---|
| CallPLaneOverWrite | Toggles between **Enabled** and **Disabled**. Change the setting of this field by highlighting the field and pressing **Select**. Enabling this flag sends real-time updates while you are on a call.<br>It is useful to check if a manager's status is busy or idle before diverting a call to that manager. With this flag enabled, a change in a manager's status displays while you are on a call. |
| SmartSorting | Toggles between **Enabled** and **Disabled**. Change the setting of this field by highlighting the field and pressing **Select**. When this flag is enabled, the Manager Status screen is sorted based on new call events.<br>For the hierarchy of how the managers list is sorted, see Checking the Status of Your Managers, page 27.<br>If this flag is not enabled, the Manager Status screen is static. |
| SetDivertTarget | When the Divert All field is set to **On** for a manager (see Figure 4 page 30), incoming calls to that manager get diverted to the divert target, which is either the currently selected manager (by default) or a Directory Number.<br>To divert calls to a Directory Number, enter the number in the SetDivertTarget field; to change a Directory number, edit the SetDivertTarget field. |

*Table 7 Assistant Settings Softkeys*

| Field | What it does |
|---|---|
| Select | Pressing this button changes the settings for the two toggled fields on this screen—**CallPLaneOverWrite and SmartSorting. If you highlight the Set Divert Target field and press Select, you are taken to the screen to configure the divert target number.** |
| StpUpdt/StrUpdt | The Manager Status screen, by default, refreshes when a change in a manager's status occurs or when there is a new call for a manager.<br>The **StpUpdt** button prevents this automatic refresh.<br>You might use this button, for example, if you have 33 managers you are supporting and would like to change the setting for the 20th manager.<br>You would scroll down the manager list on the Manager Status screen, highlight the 20th name, and press **Select**.<br>However, if your screen gets updated during this time, you would lose your place in the scroll list, as well as miss potentially important status updates. Therefore, to avoid refreshes from occurring in such a situation, press the **StpUpdt** button.<br>**Note** To re-invoke the automatic updates, press the **StrUpdt** button. |
| Exit | Exits out of the Assistant Settings screen and returns you to the Manager Status screen. |
| LogOut | Logs you out of the IPMA service. You will need to re-login to the service once you log out. |

# Customizing the Distinctive Ringing Feature

Distinctive Ringing enables you to associate a unique audible ring type with each of your phone lines. You can associate a unique ring type with your manager's proxy line to distinguish quickly between your incoming calls and your manager's incoming calls.

Use this procedure to customize the Distinctive Ringing feature directly on your phone.

## Procedure

**Step 1** Press the **Settings** button on your Cisco Unified IP Phone.

**Step 2** Use the **Navigation** button to select **Ring Type** from the Settings menu (or press **2** on your phone key pad).

Each of the lines on your phone, along with its selected ring type, is displayed on your phone's LCD screen. Initially, all of these lines use the default ring type.

**Step 3** To change the ring type for a line, use the **Navigation** button to select the line, and press the **Select** softkey.

**Note** To identify which manager proxy line on your phone is associated with a particular manager, look at the My Calls panel of the Assistant Console. This is the area where manager proxy lines and manager names are displayed. (A manager's proxy line is the line on which you receive incoming calls for that manager.)

**Step 4** Use the **Navigation** button to scroll through the list of available ring types for the selected line. To hear a sample of any ring type, select the ring type, then press the **Play** softkey.

**Step 5** To associate a new ring type, press the **Select** and **Ok** softkeys and then press **Exit**.

# For Managers—Using Your Phone with the Manager Assistant

This topic describes how to use your phone with the Manager Assistant in the shared-line and proxy-line modes:

- Using Your Phone with the Manager Assistant in the Shared-Line Mode, page 37
- Using Your Phone with the Manager Assistant in the Proxy-Line Mode, page 38
- Using the Intercom Feature to Speak to an Assistant, page 46
- Muting the Ringer on Your Phone, page 47
- Using Cisco Extension Mobility, page 47

Your system administrator is responsible for choosing the shared-line or proxy-line mode, and you need to identify the mode before you begin using the Manager Assistant. See Identifying the Mode on a Manager's Phone, page 3.

## Using Your Phone with the Manager Assistant in the Shared-Line Mode

This topic describes for managers how to use the Manager Assistant in the shared-line mode. Within this topic, see these subtopics:

- Diverting and Transferring Calls, page 38
- Using the Intercom Feature to Speak to an Assistant, page 46

In the shared-line mode, you and your assistant are assigned the same directory number, and your assistant uses the shared number to handle calls for you. See Overview of Shared-Line and Proxy-Line Modes, page 2.

The Manager Assistant provides these features for managers who are configured for shared-line mode:

- Enhanced call-handling features on your Cisco Unified IP Phone—Provides softkeys and a status window on your phone's LCD screen.
- Intercom capabilities—Enables you to place intercom calls to your assistant and receive them from him or her.
- Web-based feature configuration—Enables you to customize the Divert target using the Manager Configuration window. Or, your assistant can configure this feature for you from the Assistant Console.

# Diverting and Transferring Calls

Managers can use the Manager Assistant softkeys on your phone to divert, transfer, and generally handle active calls:

- Redirecting an Incoming Call Immediately to Another Number

  You can press the **Redirect** softkey to divert a call that is ringing, connected, or on hold from the phone to another phone number that has been set up as the divert target. You or your assistant can change this target from the Manager Configuration window.

- Transferring a Call to Voice-Messaging Service

  You can press the **TrnsfVM** softkey to send a call immediately from your phone to your voice-messaging service. You can transfer a call on hold to your voice messaging service.

# Using Your Phone with the Manager Assistant in the Proxy-Line Mode

This topic describes for managers use the Manager Assistant in the proxy-line mode. Within this topic, see these subtopics:


- Understanding Assistant Selection, page 39
- Using the Status Window, page 40
- Diverting and Transferring Calls, page 38
- Configuring an Alert Tone for Incoming Calls, page 42
- Diverting and Transferring Calls, page 38
- Using Call Filtering, page 44
- Using the Intercom Feature to Speak to an Assistant, page 46


When you use the Manager Assistant in the proxy-line mode, you are assigned a directory number and your assistant is assigned an alternate directory number to use as a proxy number (line) to handle calls for you. See Overview of Shared-Line and Proxy-Line Modes, page 2.

Your system administrator is responsible for choosing the shared-line or proxy-line mode, and you must identify the mode before you begin using Manager Assistant. See Identifying the Mode on a Manager's Phone, page 3.

The Manager Assistant provides these features for managers who are configured for the proxy-line mode:

- Call-routing—Selectively redirects incoming calls to your phone or to your assistant's phone based on your custom filter list.
- Enhanced call-handling and monitoring features on your Cisco Unified IP Phone—Provides new softkeys and a status window on your phone's LCD screen.

- Intercom capabilities—Enables you to place intercom calls to and receive intercom calls from your assistant.
- Web-based feature configuration—Enables you to customize some manager features, such as the Divert target, using the Manager Configuration window. If you prefer, your assistant can configure these features for you from the Assistant Console.

# Understanding Assistant Selection

As a manager, you are logged in automatically to the Manager Assistant feature unless you are configured to use Cisco Extension Mobility.

To handle your calls, your assistant must log in to the Assistant Console and remain online. Your active assistant is the one who is handling calls for you currently. If that assistant logs out or goes offline, the Manager Assistant attempts to assign another assistant to you.

**Note** As of Release 6.1(4), if the system administrator changes a user's username, preferred location, or password (assistants), that user is not logged off. For user-ID changes, neither the manager nor his or her assistant is logged off when that manager's user ID is changed; however, an assistant is logged off the assistant's phone and the Assistant Console when that assistant's user ID is changed.

## Identifying Your Active Assistant

If you have multiple assistants, you can identify which assistant is currently active by pressing the **Services** button on your phone and selecting **Assistant Service**. Item 3 identifies your active assistant. See Table 8.

## Assigning Your Default Assistant

When possible, the Manager Assistant assigns your default assistant to serve as your active assistant. If that assistant is unavailable (offline or logged out), the Manager Assistant assigns another assistant until your default assistant logs in or restores online availability.

You (or your assistant) can choose your default assistant from the Manager Configuration window. For details, see Assigning a Default Assistant to a Manager, page 50.

## Changing Assistants

If you have multiple assistants and more than one of them is available online, you can override the automatic selection by choosing your active assistant manually.

To see the assistant list, select item 3 from the Manager Status menu. Then you can select another assistant. See Table 8.

### When Assistants are Not Available

If all of your assistants are unavailable, the Assistant icon (left-most icon) in the Manager Status menu on your phone appears crossed out. Your call-handling support resumes as soon as one of your assistants logs in.

## Using the Manager Status Menu on Your Phone

To open the Manager Status menu on your phone, press the **Services** button and choose Assistant Service. Table 8 describes Manager Status menu items and associated tasks.

***Table 8 Manager Status Menu Items and Associated Tasks***

| Manager Status Menu Item | | What it does |
|---|---|---|
| **1** | Filter | Toggles call filtering off and on. |
| **2** | Filter Mode | Toggles between Inclusive or Exclusive filters. |
| **3** | Assistant | Displays your active assistant and other available assistants. |

## Using the Status Window

The Manager Status Menu appears on the LCD screen of your Cisco Unified IP Phone.

There are two areas within the Manager Status menu:

- Assistant Watch area—The top part of the status window displaying the caller ID and the elapsed time for a call that an assistant is handling for you. See Table 9.
- Assistant and Features area—The largest portion of the status window displaying icons to indicate the presence of an active assistant and the on/off status of your features. See Table 10.

The status window is not visible when you are using your phone to place or receive calls.

Press the **SetWtch** softkey to toggle Assistant Watch off and on.

***Table 9 Assistant Watch Messages***

| Message | Meaning |
|---|---|
| "Assistant Watch - ON" | Assistant Watch is on but no connected or incoming calls are being redirected to your assistant at this time. |
| "Call from" followed by caller ID | An incoming call was redirected to your assistant and is currently ringing on your assistant's phone. You can intercept the call now. |
| Caller ID and a timer | The assistant answered the incoming call. The timer begins when the assistant answers, or otherwise handles, the call. |

*Table 9 Assistant Watch Messages (continued)*

| Message | Meaning |
|---|---|
| "Assistant Watch - OFF" | Assistant Watch is off. To set it to on, press the **SetWtch** softkey. |
| "Filtering Down" | Call Filtering feature is unavailable at this time. |

(The icons for the Cisco Unified IP Phones with black and white LCD screens are the same as for the phones with colored screens, except as noted in the table.)

*Table 10 Message Status Icons on the Cisco Unified IP Phones*

| Feature | Description |
|---|---|
| Assistant Available | The assistant icon resembles a person and is located on the left side of your status window. The icon indicates that an active assistant is ready to take your calls. |
| Assistant Unavailable | The assistant-unavailable icon resembles a person with a line across it. This indicates that all of your assistants are unavailable.<br>To identify your active assistant, press the **Services** button on your Cisco Unified IP Phone and then select Assistant Service. |
| Call Filter Enabled | A window with a pass-through green arrow and deflected red arrow indicate that filtering is on.<br>**Note** For the Cisco Unified IP Phones with black-and-white LCD screens, the Call Filter Enabled icon is a mesh-filled circle. |
| Call Filter Disabled | A crossed-out window with a pass-through green arrow and deflected red arrow indicates that filtering is off.<br>To toggle the filter off and on, select **Filter** from the Manager Status menu. You can configure call filtering from the Manager Configuration web page.<br>**Note** For the Cisco Unified IP Phones with black-and-white LCD screens, the Call Filter Disabled icon is a hollow circle. |
| Do Not Disturb Enabled | A crossed-out bell indicates that the feature is on (ringer is disabled). |

*Table 10 Message Status Icons on the Cisco Unified IP Phones (continued)*

| Feature | Description |
|---|---|
| Do Not Disturb Disabled | A bell indicates that the feature is off (ringer is enabled).<br>To enable/disable the DND feature and turn your ringer on or off, press the **DND** softkey. |
| Divert All Enabled | An arrow deflected by a barrier indicates that the feature is *on* (calls are being redirected away from your phone). |
| Divert All Disabled | A crossed-out arrow deflected by a barrier indicates that the feature is off (calls are being directed to your phone).<br>To enable/disable the Divert All feature, press the **DivAll** softkey. The initial default target for this feature is your selected assistant. You can change the target from the Manager Configuration web page.<br>**Note** For the Cisco Unified IP Phones with black-and-white LCD screens, this icon is a straight arrow pointing at a phone (directing calls to your phone). |

## Configuring an Alert Tone for Incoming Calls

Incoming calls appear on the manager's phone screen but ring only on the assistant's phone. Use this procedure to add an audio alert to incoming calls on the manager's phone.

### Procedure

**Step 1** Press the **Services** button.

**Step 2** Select and set **Alert Tone** to **On**.

The alert sounds once per call.

The alert tone does not play for incoming calls in these instances:

- The alert tone for your phone is turned off from the assistant's phone or the Assistant Console.
- The Assistant Watch feature is off.
- You set calls to redirect to your assistant automatically.

## Intercepting a Call that is Ringing on the Assistant's Phone

To intercept a call that is ringing on your assistant's phone and to redirect the call to your own phone, press the **Intrcpt** softkey on your Cisco Unified IP Phone

To successfully intercept the call, you must press the Intrcpt softkey before your assistant answers the call. You cannot intercept calls that have already connected.

When a call for you is ringing on your assistant's phone, you can see the text "Call from" and the caller ID in the Assistant Watch portion of the status window on your phone.

## Redirecting an Incoming Call to Another Number Immediately

To redirect a call that is ringing, connected, or on hold from your phone to another phone, press the **Redirect** softkey. By default, the Redirect feature redirects calls to your selected assistant. However, you or your assistant can substitute any phone number as the divert target.

If the assistant is the designated divert target and if you have Assistant Watch on, you can verify that the call has been redirected to your assistant by looking at the status window on your LCD screen.

The Redirect feature and the Divert All (DivAll) feature share the same divert target. You or your assistant can change this target from the Manager Configuration window.

## Redirecting All Calls to Another Number

To toggle the Divert All (DivAll) feature on or off, press the **DivAll** softkey. When this feature is on, DivAll redirects your incoming calls to another phone. For the icons, see Table 10 page 41.

Unlike Redirect, which you invoke on a call-by-call basis, DivAll enables you to redirect all future incoming calls until you set the feature to off.

By default, the DivAll target is your selected assistant. However, you or your assistant can substitute any phone number as the divert target. For example, if you plan to be away from the office and you want to receive your calls during this time, you can set the Divert All target to your cell phone number.

DivAll applies to all of your lines that your assistant can manage, not calls that your assistant cannot access or calls that you receive on an intercom call.

The DivAll and Redirect features share the same divert target. You or your assistant can change this target from the Manager Configuration window.

If you have both call filtering and DivAll enabled, the Manager Assistant first applies call filtering to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, the Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

If you configure call forward all on your phone, all of your incoming calls are forwarded to the call-forward number that you entered. Your calls are not filtered to your assistant, and they are not redirected to your divert target.

## Transferring a Call to Voice-Messaging Service

To send a call immediately from your phone to your voice-messaging service, press the **TrnsfVM** softkey. You can transfer a call on hold to your voice messaging service.

## Using Call Filtering

Call filtering redirects your incoming calls selectively to your assistant, based on the caller ID and these configurations and settings:

- Filter Mode
- Filter Lists
- Filter on/off status

Table 11 describes these filter settings.

The initial default settings are such that Inclusive call filtering is on and filter lists are empty, so all of your incoming calls are redirected to your assistant. To customize filtering, see Creating Filter Lists for a Manager, page 51.

For your assistant to handle your calls, call filtering must be enabled. If you have both call filtering and Divert All (DivAll) enabled, the Manager Assistant first applies call filtering to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, the Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

For example, you can set up a inclusive filter to receive only family calls. Your assistant then handles all other calls. If you have plans to be away from your office, you can set the DivAll target to your cell phone number, enable Divert All, and receive the calls from your family on your cell phone. Your assistant still receives all of the other calls.

When you configure call forward all on your phone, all your incoming calls are forwarded to the call-forward number that you entered. Your calls are not filtered to your assistant and they are not redirected to your divert target.

*Table 11 Call-Filtering Settings*

| Setting | Purpose | Where to find it | Notes |
|---|---|---|---|
| Filter Mode | Use the filter mode setting to toggle between Inclusive and Exclusive filter lists. For more information, see Table 2 page 11. | Toggle between Inclusive and Exclusive filter lists from the Manager Status menu on your phone's LCD screen. | By initial default, the Inclusive filter is active.<br>Assistants can control the filter mode for you from the Assistant Console. |
| Filter Lists | Filter lists consist of one or more phone numbers (partial or entire). When you get a new call and filtering is on, the Manager Assistant compares the caller ID to the numbers in your active list. Depending on whether the numbers match and which filter list is active (Inclusive or Exclusive), the Manager Assistant then routes the call to you or to your assistant. | Create filter lists from the Manager Configuration window. Choose the Inclusive or Exclusive Filter tab. | Your assistant can set up filter lists for you. By initial default, filter lists are empty. |
| Filter on/off status | The filter on/off setting toggles call filtering on or off.<br>When the feature is on, all of your incoming calls are intercepted and redirected according to filter settings. | Toggle filtering on and off from the Manager Status menu on your phone's LCD screen. Press the **Services** button and choose Assistant Service and then select **Filter**. | The initial default setting for the filter is on. |

A circle icon in the Manager Status menu indicates if the call filtering feature is on or off:

- On = Mesh-filled circle icon.
- Off = Hollow circle.

# Using the Intercom Feature to Speak to an Assistant

The Intercom feature is an optional feature that enables you to speak to your assistant over an intercom line.

It is configured by your system administrator so if the feature is not available on your phone, contact your system administrator.

### Procedure

**Step 1** To place an intercom call, press the Intercom button that corresponds to your assistant.

**Step 2** When you initiate the call, your assistant's speakerphone answers automatically. You can begin talking using your speakerphone, headset, or handset. To speak to you, the assistant must press the Intercom button on his or her IP phone.

The following applies for all Cisco Unified IP phones except for the Cisco Unified IP Phones 7961G-GE, 7961G, 7960G, 7941G-GE, 7941G, and 7940G.

- In the shared-line mode, the current active assistant is the target for your intercom call. If no assistants are active when you log in, no target exists for your call.
- In the proxy-line mode, various outcomes are possible after you initiate the call:
  - If a default assistant is configured and available, that assistant is the target for your call. If that assistant is unavailable, the next available assistant becomes the target. If no assistants are active when you log in, the default assistant remains the target.
  - If a default assistant is not configured, the current active assistant becomes the target. If that active assistant goes offline while you are logged in, the next available assistant becomes the target. If no other assistants are available, the assistant that went offline remains the target.
  - If a default assistant is not configured and no assistants are active at the time you log in, no target exists for your call.

**Note** Only for the Cisco Unified IP Phones 7961G-GE, 7961G, 7960G, 7941G-GE, 7941G, and 7940G, if your assistant is busy on another call, the intercom call rings on the assistant's phone, and he or she must answer it manually to hear the intercom. (This is also the case when your assistant places an intercom call to you at a time when you are on another call.) For other phones, the assistant does not need to answer the call to hear the intercom, as described at the beginning of this step.

**Step 3** To end the intercom call, hang up the phone (or push the Speaker or Headset button).

# Muting the Ringer on Your Phone

To mute the ringer on your phone, press the **DND** softkey to toggle the Do Not Disturb (DND) feature on or off. (If the DND feature is not available on your phone, contact your system administrator.)

When this feature is on, the ringer is disabled on your Cisco Unified IP Phone. The DND feature disables the ringer for all lines on the phone. (Intercom is not affected by the DND feature.) The initial default setting is off.

The DND feature is represented by a bell icon in the Manager Assistant status window on the LCD screen of your Cisco Unified IP Phone. For the icons, see Table 10 page 41.

# Using Cisco Extension Mobility

To use the Manager Assistant with Cisco Extension mobility, log in to Cisco Extension mobility and select Assistant Service in the Services menu.

See the Cisco Unified IP Phone guides for more information about the Cisco Extension Mobility feature.

# Configuring Manager Features

Managers and assistants can modify manager preferences from the Manager Configuration window:

- Managers can access the window from a website.
- Assistants can access the window from the Assistant Console.

Your system Administrator configured your Manager Assistant to operate in the shared-line or proxy-line mode. For more information, see Overview of Shared-Line and Proxy-Line Modes, page 2.

The initial default settings enable managers to use the Manager Assistant without configuring preferences first.

Within this topic, see these subtopics:


- For Managers—Accessing the Manager Configuration, page 49
- For Assistants—Accessing Manager Configuration, page 50
- Assigning a Default Assistant to a Manager, page 50
- Configuring the Divert Target for a Manager, page 50
- Creating Filter Lists for a Manager, page 51


## For Managers—Accessing the Manager Configuration

Managers access the Manager Configuration page using a website. You can obtain the URL from your system administrator.

**Step 1** On a computer running Microsoft Windows 2000 or later, open a Microsoft Internet Explorer (IE) browser. The browser version must be 5.5 or higher.

**Step 2** Open the URL that your system administrator provided. The URL should look like this: http://<ip-address>/ma/desktop/maLogin.jsp

A pop-up window prompts to ask if you want to install the Manager Assistant software.

**Step 3** Click the check box to indicate that you agree with this text: “Always trust content from Cisco Systems Inc.” Then click **Yes**. The Login page appears.

**Step 4** Enter your user name and password (as provided by your system administrator) and click **Sign in**. The Manager Configuration window appears.

**Step 5** When you are ready to log out, close the browser window.

## For Assistants—Accessing Manager Configuration

Assistants can access the Manager Configuration window from the Assistant Console.

To access the window for a particular manager, right-click anywhere in the row for that manager in the My Managers panel of the Assistant Console and then choose **Configure** from the pop-up menu.

To access the window for all of your managers, choose **Manager > Configuration** from the menu bar. If necessary, choose the manager for whom you want to configure features from the Manager drop-down menu.

## Assigning a Default Assistant to a Manager

Use this procedure to identify one of a manager's configured assistants as the default assistant.

When possible, the Manager Assistant assigns the default assistant as the manager's active assistant. If the default assistant is not logged in, the Manager Assistant assigns another available assistant to serve as the active assistant. After the default assistant logs in, the Manager Assistant switches assistants so that the default assistant is active and handling calls.

**Step 1** From the Manager Configuration window, click the **Default Assistant** tab (if necessary) to display the Default Assistant Selection window.

**Step 2** Select the appropriate assistant from the assistant drop-down menu and save the change.

## Configuring the Divert Target for a Manager

Managers can use configure a Divert target in these ways:

- Proxy-line mode—Managers using the Manager Assistant can use the Divert All (DivAll) and Redirect (Redirect) features to send calls to the assistant or to another phone number (also known as the target). The DivAll feature and the Redirect feature share the same Divert target.
- Shared-line mode—Managers using the Manager Assistant in the shared-line mode can set up a Divert target and forward calls as the calls come in by using the **Redirect** softkey. The divert screen displays automatically when you log in.

By initial default, the Divert target is the manager's active assistant. Managers and assistants can use this procedure to change the target.

**Step 1** From the Manager Configuration window, click the **Divert** tab to display the Divert Configuration window.

**Step 2** (Proxy-line mode only) Select **Directory Number** or **Assistant**.

**Step 3** If you selected Directory Number, enter a valid phone number. Enter the number exactly as you would dial it from your office phone and save the change.

# Creating Filter Lists for a Manager

Filter lists enable managers or assistants to customize the manager's call-filtering feature.

By default, filter lists are empty. Add numbers to a filter list to customize it. Choose a filter mode to toggle between Inclusive or Exclusive filter lists. For the list descriptions, see Table 2 page 11.

Only one filter mode (Inclusive or Exclusive) can be active at any time. Managers can toggle between filter modes from the Manager Assistant menu on their phones. Assistants can toggle between filter modes for a manager from the Assistant Console.

The Manager Assistant compares the caller ID of the incoming call to the phone number(s) in the active filter list.

- If Inclusive filtering is on—As an example, if you add the phone number 54321 to a manager's Inclusive filter list, every incoming call placed to the manager's office phone from 54321 is routed to the manager (not to the assistant).
- If Exclusive filtering is on—If you add the number 54xxx to a manager's Exclusive filter list, every incoming call from a phone line with a 5-digit number that begins with 54 is routed to the assistant (and not to the manager).

Filter lists can include these wildcards:

- x—Use x to replace a single digit anywhere in the filter. For example, "123x5" represents 5-digit phone numbers, where the fourth digit is 0 to 9. You can use an uppercase or lowercase x.
- *—Use * to replace multiple digits at the beginning or end of the filter. For example, "5*" represents phone numbers of any length that begin with 5.

Besides wildcards, filter lists can contain hyphens (–), periods (.), and blank spaces.

Filter lists can be empty. By initial default, the filter is enabled and the Inclusive filter list is empty. This means that all of a manager's incoming calls are redirected to the assistant.

Managers—You can activate your filter lists from your phone. Open the Manager Assistant menu on your phone. Press **1** to toggle the Filter feature on and off. Press **2** to toggle between Inclusive and Exclusive filter modes.

Managers and assistants can use the following procedure to create filter lists.

If you have both call filtering and Divert All (DivAll) enabled, the Manager Assistant first applies call filtering to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, the Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

For the call-filtering icons in the Manager Assistant status window, see Table 10 page 41.

### Procedure

**Step 1** From the Manager Configuration window, click the **Inclusive** or the **Exclusive** tab to display the appropriate configuration window.

**Step 2** In the Filter field, enter a partial or complete phone number.

If you need help, click the **More Info** link to see example filters.

**Step 3** You can add, replace, or delete filters:

- To add a new filter, enter a filter in the Filter field and click **add**. The new filter appears in the Filter List.
- To replace an existing filter with a new one, select the existing filter that you want to modify in the Filter List. Change the filter in the Filter field and click **replace**. The modified filter appears in the Filter List.
- To delete a filter, select the filter in the Filter List and click **delete**. The deleted filter is removed from the Filter List.

**Step 4** Save your changes.

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**Americas Headquarters**
Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 527-0883

**Asia Pacific Headquarters**
Cisco Systems, Inc.
168 Robinson Road
#28-01 Capital Tower
Singapore 068912
www.cisco.com
Tel: +65 6317 7777
Fax: +65 6317 7799

**Europe Headquarters**
Cisco Systems International
BV
Haarlerbergpark
Haarlerbergweg 13-19
1101 CH Amsterdam
The Netherlands
www-europe.cisco.com
Tel: 31 0 800 020 0791
Fax: 31 0 20 357 1100

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